University KnowledgeBase

Pushing the KnowledgeBase Limits Without Getting a Faceplant

John Cowsert (AITS)
Agenda

- Introductions
- KnowledgeBase Overview
- Features
- Testimonials
- Lessons Learned
Introductions

- John Cowsert – AITS
- Jonathan Dixon – Technology Services
- Dena Strong – Technology Services
- Allison Payne – ACES
KnowledgeBase Overview

• Online Self Service Tool for University of Illinois
• Documentation Repository
• Vended by University of Wisconsin
• Used by Higher Education
• Started in 2003
• University of Illinois joined 2013
KnowledgeBase Overview

• Partner Institutions

[Logos of various universities and institutions]
KnowledgeBase Overview – Group Spaces
KnowledgeBase Overview—Internal and External KBs

Most Popular Answers

1. 2FA - Token
2. 2FA - UI Verify
3. 2FA - Frequently Asked Questions (FAQ)
5. 2FA - What is 2-Factor Authentication?
6. Service Desk Handbook - Production Job Scheduling - How to run Application
7. Service Desk Handbook - Toolkit - DS Knowledge Center
8. 2FA - Self Enrollment Guide

Most Recent Answers

1. AITS KB Advisory Board Meeting Minutes 7-13-16
2. AITS KB Advisory Board Meeting Minutes 6-15-16
KnowledgeBase Overview—Integrated Design

Help with enterprise-level applications at the University of Illinois System

NEWS AND ANNOUNCEMENTS

Currently there is no active news.

MOST POPULAR ANSWERS

- Enterprise Mode (Windows) - Configure IE 11 to Run Websites that Require Certain Compatibility Mode Settings

MOST RECENT ANSWERS

1. Tableau - Service Provided
2. Tableau - What is a Tableau Data Extract (TDE)?
KnowledgeBase Overview

• Top overall Unified Site https://answers.uillinois.edu

• Subsites that feed into Unified Site
  • Technology Services at Illinois https://answers.uillinois.edu/illinois
  • University of Illinois System https://answers.uillinois.edu/ua
  • University of Illinois at Springfield https://answers.uillinois.edu/uis
  • College of Agricultural, Consumer, and Environmental Sciences https://answers.uillinois.edu/illinois.aces
  • College of Liberal Arts and Sciences https://answers.uillinois.edu/illinois.las
KnowledgeBase Overview

- Why it works
  - 3,364 Active KB Documents to Date
  - 1.5 million views in 2017 so far...
  - Over 6 million views since 2013

KnowledgeBase Document Hit Count

- 0
- 500000
- 1000000
- 1500000
- 2000000
- 2500000
- 3000000
- 3500000
- 4000000

- 2013
- 2014
- 2015
- 2016

- Spring 2017
KnowledgeBase Overview

Doc views by institution:

- University of Wisconsin-Madison (44,822,258)
- University of Chicago (4,084,008)
- University of Wisconsin-Green Bay (3,094,194)
- University of Wisconsin-Platteville (924,779)
- University of Wisconsin-Extension (501,117)
- University of Illinois (3,493,401)
- Southern Illinois University Edwardsville (167,299)
- University of Wisconsin-Parkside (416,358)
- University of Wisconsin-Milwaukee (940,309)
- Chippewa Valley Technical College (143,512)
- Parkland College (446,603)
- University of Wisconsin-Stout (877,600)
- Missouri University of Science and Technology (7,412)
- University of Wisconsin-Oshkosh (353,733)
- University of Wisconsin-La Crosse (33,364)
- Rice University (62,339)

Other institutions:
- University of Mississippi Medical Center (27,483)
- Northwestern University (201,140)
- Washington State University (3,684)
- New Mexico State University (13,368)
- Wisconsin Foundation and Alumni Association (151)
KnowledgeBase Overview

Doc count by institution

- University of Wisconsin-Madison (47,871)
- University of Chicago (2,619)
- University of Wisconsin-Green Bay (1,064)
- University of Wisconsin-Platteville (1,136)
- University of Wisconsin-Extension (1,859)
- University of Illinois (5,507)
- Southern Illinois University Edwardsville (956)
- University of Wisconsin-Parkside (626)
- University of Wisconsin-Milwaukee (1,713)
- Chippewa Valley Technical College (359)
- Parkland College (582)
- University of Wisconsin-Stout (863)
- Missouri University of Science and Technology (773)
- University of Wisconsin-Oshkosh (915)
- University of Wisconsin-La Crosse (251)
- Rice University (343)

University of Mississippi Medical Center (185)
Northwestern University (353)
Washington State University (106)
New Mexico State University (454)
Wisconsin Foundation and Alumni Association (12)

Spring 2017
KnowledgeBase Overview
Features

• Internal/External KBs
• Mobile App
• Integrated Design Features
• Built-in Statistic Reports
Features – Built-in Statistic Reports

Document Count by Status for the Group
- Active: 978
- In Review: 43
- In Progress: 165
- Inactive: 141
- Unreviewed for more than a year: 27
- Expired: 85

My Document Count by Status
- Active: 94
- In Review: 0
- In Progress: 7
- Inactive: 8
- Unreviewed for more than a year: 0
- Expired: 0
Features – iOS and Android Mobile Apps

Internet Explorer 9, 10 and 11 (Win) - Clearing Cache and Cookies

This document explains how to clear the cache and cookies in Internet Explorer 9, 10 and 11.

1. Select Tools (via the Gear icon) > Safety > Delete browsing history...

NOTE: You can also access this menu by holding Ctrl + Shift + Delete.
Features – Assessments

**University Administration KB Internal KB Assessment**

Signed in as: cowser@illinois.edu

**Quiz: Password Assessment**

Test knowledge of password procedures

1) A student no longer attends the University of Illinois (UIC). They call in for assistance with their enterprise password (Not set up in IAM). What steps should be taken to assist them in changing their password?

- A) Verify the student by first and last name, DOB and UIN, and give them a legacy enterprise password reset.
- B) Verify the student by first and last name, DOB and UIN, look them up in ISA to see if they have both UIC AD and EAS LDAP under Account Data, if not ask for them to email address they give you.
- C) Verify the student by first and last name, DOB and UIN, look them up in ISA to see if they have both UIC AD and EAS LDAP under Account Data, check banner SPAIDEN for non-University phone numbers and email addresses, and verify which one they would like a token sent to.
- D) Verify the student by first and last name, DOB and UIN, and refer them to their Campus Help Desk (ACCC) for assistance with resetting their passwords.

2) A parent calls in stating they cannot login to their students account to get their 1098T. What can we do?

- A) Ask them if the student is available to speak with, if so verify the student and assist them with the password change.
- B) Advise the parent we are open 24/7 and to have their student call at their convenience to assist with the password reset.
- C) Advise the parent we cannot help them.
- D) Verify the student information with the parent, if the information is correct we can change the password for them.
- E) Either a or b.
## Features – Assessments

### University Administration KB Internal KB Assessment

Signed in as: cowser1@illinois.edu

#### Available Modules

<table>
<thead>
<tr>
<th>No.</th>
<th>Module Name</th>
<th>Info Page</th>
<th>Type</th>
<th>Max. Qs</th>
<th>Repeat Qs</th>
<th>Max. Attempts</th>
<th>Your Attempts</th>
<th>Your Avg.</th>
<th>Action</th>
<th>Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Customer Service Assessment</td>
<td>Quiz</td>
<td>10</td>
<td></td>
<td>Yes</td>
<td>3</td>
<td>1</td>
<td>70%</td>
<td>Take quiz</td>
<td>2017-04-26 13:05 to 3000-01-01 00:00</td>
</tr>
<tr>
<td>2</td>
<td>Operations Assessment</td>
<td>Quiz</td>
<td>10</td>
<td></td>
<td>Yes</td>
<td>3</td>
<td>1</td>
<td>70%</td>
<td>Take quiz</td>
<td>2017-04-24 10:39 to 3000-01-01 00:00</td>
</tr>
<tr>
<td>3</td>
<td>Password Assessment</td>
<td>Quiz</td>
<td>8</td>
<td></td>
<td>Yes</td>
<td>3</td>
<td>0</td>
<td>NA</td>
<td>Take quiz</td>
<td>2017-05-17 13:47 to 3000-01-01 00:00</td>
</tr>
<tr>
<td>4</td>
<td>Policy and Procedure Assessment</td>
<td>Quiz</td>
<td>10</td>
<td></td>
<td>Yes</td>
<td>3</td>
<td>1</td>
<td>80%</td>
<td>Take quiz</td>
<td>2017-04-26 13:23 to 3000-01-01 00:00</td>
</tr>
<tr>
<td>5</td>
<td>Production Requests assessment</td>
<td>Quiz</td>
<td>10</td>
<td></td>
<td>Yes</td>
<td>3</td>
<td>1</td>
<td>30%</td>
<td>Take quiz</td>
<td>2017-02-16 11:37 to 3000-01-01 00:00</td>
</tr>
</tbody>
</table>

#### Your Results

<table>
<thead>
<tr>
<th>No.</th>
<th>Module Name</th>
<th>Number of Questions</th>
<th>Correct Answers</th>
<th>Wrong Answers</th>
<th>Repeat Questions</th>
<th>Score</th>
<th>Time Stamp</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Production Requests assessment</td>
<td>10</td>
<td>3</td>
<td>7</td>
<td>0</td>
<td>30%</td>
<td>2017-05-16 14:54:12</td>
</tr>
<tr>
<td>2</td>
<td>Policy and Procedure Assessment</td>
<td>10</td>
<td>8</td>
<td>2</td>
<td>0</td>
<td>80%</td>
<td>2017-05-16 14:51:37</td>
</tr>
<tr>
<td>3</td>
<td>Operations Assessment</td>
<td>10</td>
<td>7</td>
<td>3</td>
<td>0</td>
<td>70%</td>
<td>2017-05-16 14:48:11</td>
</tr>
<tr>
<td>4</td>
<td>Customer Service Assessment</td>
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<td>7</td>
<td>3</td>
<td>0</td>
<td>70%</td>
<td>2017-05-16 14:43:26</td>
</tr>
</tbody>
</table>
Features – More

- Document Sharing
- Document Review
- Future Activation and Expiration Dates
- Shibboleth Active Directory Authentication
- WYSIWYG Document Creation
- Document Templating
- The Include Doc Function
- Email Help Desk Custom Button
- Feedback Buttons sent to statistics
- Expired Documents automatically removed
- Feedback Comments sent to ticketing system
- Reminder Emails
Testimonials

• What do they like?

• Best Practices

• What features do they use?

• Tips?

Answers @ ACES

University of Illinois System
Urbana-Champaign
Chicago
Springfield

TECHNOLOGY SERVICES
AT ILLINOIS

Spring 2017
Testimonials
University of Illinois System
Testimonials
University of Illinois System

• What do they like?
  • Externally published documents
  • Multiple internal document types
  • Built-in Review System
  • No need to bother webmasters
Testimonials
University of Illinois System

• Best Practices
  • Get Leadership buy-in early
  • KBGuide is king
  • Slow approach
Testimonials
University of Illinois System

• What features do they use?
  • Include Doc
  • Sharing
  • Future Activation and Expiration Dates
Testimonials
University of Illinois System

• Tips?
  • Publish one document for both Internal and External KB
  • Create User Access Groups for Internal use
Testimonials
Technology Services

• What do they like?

• A simple tool for customer friendly articles
• Onboard Review Process / KB Article Lifecycle
• Automatic Removal of Expired Documents
• Commitment to Best Practices
• Customizable URL tool – like go.illinois for the KB
Testimonials
Technology Services

• Best Practices
  
  • Consistency Consistency Consistency Consistency
  
  • Mini style guide: document and share our own naming standards, tagging standards
  
  • Write to the customer’s perspective
Testimonials
Technology Services

• What features do they use?

• Batch Update
• Keywords for easier searching
• Topics
• Relevance
• Use Case Scenarios and Templating
• Extensibility – jQuery, embedded Box folders, wiki functionality via JS/CSS
Testimonials
Technology Services

• Tips?

• Structured use of included documents in templates for consistency
• Content audit before migration
• Change site color scheme for internal & external views
• Mark text internal rather than build two documents
• Future Activation and Expiration Dates
• Validate document ownership
Use Cases
Classrooms

• Use case: Hundreds of rooms with thousands of frequently changing pictures

• Template tricks:
  • Include documents in the template
  • Box folder for embedded views
  • Standard two images displayed directly from the Box folder
Use Cases
ClassTech Internal

• Use case: Document suite menu & troubleshooting decision trees

• jQuery UI-based menu system driven by KB include doc

• Borrowed wiki tree-building functionality via JavaScript and CSS selectors
Use Cases
ClassTech Internal

<table>
<thead>
<tr>
<th>Room details</th>
<th>Troubleshooting</th>
<th>Audio / video / projection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Logging in</td>
<td>Training</td>
<td>Interaction - Keyboard</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- iClicker</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Network</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Software</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(Internal) Ticketing system</td>
</tr>
<tr>
<td></td>
<td></td>
<td>documentation</td>
</tr>
</tbody>
</table>

For problems with:
- Java
- Other software
- **other software**
- **flash drives**
- **Flash drives**

Audio:
- Video
- Laptops
- Classroom computer / Resident PC
- DVD
- Transparency projector / doc camera
- Tablets

Microphones:
- No audio is coming from the system

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TECHNOLOGY SERVICES
AT ILLINOIS
Testimonials
College of ACES

• What do they like?
  • Existing documentation across the system
  • Responsive service team @ UW-Madison
  • Self-service documentation
  • Broad, welcoming community of KB users

Answers @ ACES
Testimonials
College of ACES

• Best Practices

• Use a project plan and timeline
• Usability testing before launching
• Gain momentum through training the trainers
• Follow the conventions and accessibility guidelines

Answers @ ACES
Testimonials

College of ACES

• What features do they use?
• Group Authorization by org
• Document Sharing
• Internal and External Documents
• Site Preferences/Document Content Modules
• Coming Soon... Site customization for user-friendly messages

Answers @ ACES
Testimonials
College of ACES

• Tips?

• Get stakeholder buy-in early
• Commitment to user training
• Think outside of the IT box
• Participate in campus user group
• Don’t try to reinvent the wheel

Answers @ ACES
Lessons Learned

• Use the KBGuide Guidelines
• Help Desks should rely on Internal not External KB
• Import vs Start from scratch
• Microsoft Word requires an HTML cleaner
• Get stakeholder buy-in
• Have documentation in place before announcing
• Do not abuse expiration dates
• Over-Train adding document screenshots/attachments
Summary and Review

- GroupSpace set up in days
- Excellent Support from University of Wisconsin
- Community Support from GroupSpace Members
- Monthly meetings with Wisconsin
- Coming soon... Community Site
- Cost $1000/GroupSpace annually
University KnowledgeBase

- General Questions: knowledgebase@uillinois.edu
- John Cowsert – AITS: cowsert@uillinois.edu
- Jonathan Dixon – Tech Services: jdixon@illinois.edu
- Dena Strong – Tech Services: dlstrong@illinois.edu
- Allison Payne – ACES: acpayne@illinois.edu